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ABSTRACT

A program developed a paralegal studies program for Delaware County Community College in the Philadelphia (Pennsylvania) metropolitan area. Activities included gathering of information on paralegal studies as it related to curriculum content; advisory group establishment; curriculum development; training/educational material development; and review of software needs. The project developed nine new courses and created a 2-year paralegal studies degree. This 10-page report contains course descriptions and programs for the 4-semester associate degree in paralegal studies and two-semester certificate in paralegal studies. Appendixes include information on these courses developed by the project: introduction to paralegal studies; legal communications and concepts; legal research and analysis; family law; litigation; corporations and partnerships; real estate law; computer applications for the law office; and estates, trusts, and wills. These course summaries include some or all of the following: general introduction, course competencies, content overview or outline, and reading list. (YLB)

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FINAL REPORT

PARALEGAL STUDIES PROGRAM
CURRICULUM UTILIZATION
(Contract #85-9017)

Dr. Doris D. Humphrey

DELAWARE COUNTY COMMUNITY COLLEGE
Media, Pennsylvania 19063

June 1989

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CURRICULUM AND PERSONNEL DEVELOPMENT SECTION

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II. Final Report

A. Abstract

1. Agency: Delaware County Community College
Media, PA 19063

Contract #: 85-9017

Funding Period: July 1, 1988 - June 30, 1989

Approved Funds: $8,556.00

In January 1989, Dr. Doris Humphrey, Assistant Dean of Business and Office Management contacted Trudy Riddell, a DCCC instructor to discuss program development for a Paralegal Studies program. Some of the topics discussed were:

* Need for an additional Paralegal training program in the greater Philadelphia area.
* Employment outlook, including salary for graduates.
* Formation of an advisory committee.
* The number and overall content of required courses.

2. Statement of Purpose

The paralegal profession is expanding rapidly across the nation and, like so many other legal positions, is plagued by a shortage of properly trained professionals. At present, there are approximately 10 paralegal programs in the Philadelphia metropolitan area. The primary goal of this program is to expand the pool of paralegal professionals in Delaware County by creating a paralegal studies program and to ensure that program participants obtain the necessary skills required by the legal profession.

3. Objectives Planned

The goal of this contract was to prepare a curriculum and syllabus for an associate degree program in Paralegal Studies. Specific objectives were:

* To gather appropriate information on paralegal studies as it related to curriculum content.

* To establish an advisory group from business, the legal profession, and education to assist with the development of a curriculum.

* To develop a curriculum in paralegal studies which would (1) meet identified employment needs of business/industry and (2) structure courses to address specific needs.

* To correlate newly-developed paralegal studies curriculum offerings with existing collegiate offerings.

* To develop appropriate training/educational materials.

* To review software needs and make recommendations for purchase.

* To integrate curriculum development with required facility plan.

4. Objectives Achieved

Each of the objectives were met. When the project was completed, nine new courses were developed and a two-year Paralegal Studies degree was created. The Paralegal Studies program will be implemented following final, official approval by DCCC's College Advisory System.

B. Financial Summary

	Approved Budget	Actual Expenditure
Other:		
Honorarium for Curriculum Specialist	$ 3,692	$ 2,870
Honoraria for other consultants and resource persons	1,650	1,600
Program Materials & Supplies/ Communications		
* Development/dissemination of program materials; word processing $9.80/hr x 120 hrs and benefits @ 37.5%	1,617	1,739
* Word processing and office supplies, telephone, postage	400	333
Travel 2,500 miles @ 0.225/mile	563	30
SUBTOTAL	7,922	6,572
INDIRECT @ 8%	634	526
TOTAL	8,556	7,098

III. Project Approach/Methodology

A. Materials Reviewed

1. Business Trends

The Paralegal profession is a rapidly growing career field. Studies show that this career field will grow faster than the average for all occupations through the mid-1900's. A report developed by the Pennsylvania Department of Labor and Industry and the Office of Employment Security indicates that employment in the paralegal profession will increase by 108.1 percent between 1980 and 1990.

Delaware County Community College has an Office Administration program in the Career Education Department. Therefore, the development of a Paralegal program becomes a natural progression in curriculum development.

2. Philadelphia Area Employment Outlook

Salaries range from $18,000 to $30,000 for suburban firms and from $17,000 to $50,000 in the Philadelphia area.

B. Advisory Committee

Delaware County Community College uses an advisory committee in the development of its programs. Individuals who serve on the committee help to develop curriculum content. The Paralegal Studies advisory committee consisted of a common pleas court judge, an attorney, two paralegals, three faculty members, one assistant dean, two business executives, the Executive Director of the Delaware County Bar Association, and a legal secretary. The Paralegal Studies committee members are:

PARALEGAL STUDIES ADVISORY COMMITTEE

Dr. Doris Humphrey
Office A-342
DCCC
Media, PA 19063
359-5198

Mr. Joseph Trevelino
Office A-303
DCCC
Media, PA 19063
359-5162

Ms. Rebecca Grohler
c/o David R. Black, Esq.
Front Street
Media, PA 19063

The Honorable Frank T. Hazel
Court of Common Pleas
Delaware County Courthouse
Media, PA 19063
891-4081 or 5088

Ms. Brenda Collins
Public Defender's Office
Toal Building
2nd & Orange Street
Media, PA 19063
891-4081

Ms. Joyce Bresee
Marple Newtown High School
120 Media Line Road
Newtown Square, PA 19073
359-4224

Ms. Chyllene Cattie
c/o Dechert, Price & Rhoads
3400 Centre Square West
1500 Market Street
Philadelphia, PA 19102
981-2373

Ms. Trudy Riddell
Office A-305
DCCC
Media, PA 19063

Ms. Phyllis Anderson
Office A-305
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359-5374

David R. Black, Esq.
21 W. Front Street
Media, PA 19063
566-8500

Ms. Peggy Lawler
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300 Welsh Road
Horsham, PA 19044
657-4000 x5403

Ms. Elizabeth Price
Executive Director
Del. Co. Bar Assn.
Front & Lemon Streets
Media, PA 19063

Ms. Linda Lee
1803 Westfield Court
Newtown Square, PA
853-5905

IV. Project Summary

A. Products Produced

1. Curriculum and Course Development

Based on recommendations by the advisory committee, it was decided that nine courses were necessary to adequately cover the proposed Paralegal Studies program. At its meeting on March 28, 1989, the committee reviewed the planned curriculum, the nine Paralegal Studies courses in detail, and the recommended textbook selections. The final program of studies leading to the Paralegal Associate's Degree was completed by mid-May, 1989.

2. Course Descriptions

PAR 100 INTRODUCTION TO PARALEGAL STUDIES - This introductory course is designed to provide the student with an overview of the duties of a paralegal in the legal community, familiarization with basic legal concepts, and the fundamentals of legal research.

PAR 101 LEGAL COMMUNICATIONS AND CONCEPTS - This course will provide a sound foundation upon which students may pursue a thorough and systematic course of paralegal studies. The course will emphasize six general areas that a paralegal should understand: (1) general business principles; (2) general finance principles; (3) insurance; (4) law office management; (5) preparation for litigation; (6) litigation. Terms and terminology will be specifically stressed, thereby enabling the student to master the "language" that affects or flows from the legal profession.

PAR 120 LEGAL RESEARCH AND ANALYSIS - This course introduces prospective paralegals to methods of finding the law applicable to specific legal issues. This course will acquaint the student with the principles of research, types of law books and their scope, citation methods, interpreting case and statutory law and other legal authority, annotations, government publications and corresponding kinds of legal writing, organization and format. Students learn how to locate cases and to organize research findings.

PAR 200 FAMILY LAW - This course surveys basic issues arising in a matrimonial case and procedures by which marital issues are resolved. Provides skills and methods of securing essential documentation, litigate or settle divorce, alimony, property division, support and child custody claims. Enables the student to prepare court documents, examines the anatomy of a comprehensive marriage settlement agreement.

PAR 201 LITIGATION - This course introduces students to litigation as the process for resolving disputes through the use of the court system. Provides an overview of the litigation process and a basic understanding of court procedures necessary to prepare students for assisting lawyers in a lawsuit. Areas of civil actions, including breach of contract and related lawsuits are covered.

PAR 203 REAL ESTATE LAW - The purpose of the Real Estate course is to provide the student with skills necessary to assist the attorney with a variety of residential and commercial real estate transactions. The student will learn to draft various real estate related documents including Agreements of Sale, Easement Agreements, Financing Documents and Deeds.

PAR 204 COMPUTER APPLICATIONS FOR THE LAW OFFICE - This course provides the student with a general knowledge of how computers can be used in the law office. Legal applications covered will include: litigation, estate administration, docket control, and research programs. Software programs for the business operations of the law firm, such as, word processing, calendar, and billing, will also be introduced.

PAR 205 ESTATES, TRUSTS AND WILLS - This course is designed to show the prospective paralegal how to prepare documents related to the administration of trusts and estates and the distribution of their assets. Students will learn to identify basic issues related to estate planning. Students will also acquire an understanding of the formal requisites of will drafting and execution. Procedures for probate and administration of estates are covered as are related tax issues, such as, state inheritance, federal estate and fiduciary income taxes.

3. Paralegal Studies Program

The Paralegal Studies curriculum is designed to prepare students to work in the legal field. Computer skills, communication and management skills, language arts skills, and office procedures concepts are stressed. The curriculum allows students to specialize for careers in legal offices. Upon graduation from this curriculum the student is prepared for a position as a paralegal in a law-related position.

Two programs of study will be available. The four-semester program will yield an Associate in Paralegal Studies. The two-semester program will yield a Certificate in Paralegal Studies. Coursework completed in the certificate program can be applied toward the associate degree program.

PARALEGAL STUDIES

1st Semester	Credits
English Composition I ENG 100	3
Business Math MATH 105	3
Keyboarding OFF 100	2
Introduction to Paralegal Studies PAR 100	3
Legal Communications & Concepts PAR 101	3
	14

2nd Semester	
English Composition II ENG 112	3
Business Law II BUS 242	3
Word Processing I OFF 151	4
Legal Research & Analysis PAR 120	3
Science Elective	3/4
	16/17

3rd Semester	
Family Law PAR 200	3
Word Processing II OFF 152	4
Litigation PAR 201	3
Corporations & Partnerships PAR 202	3
Social Science Elective	3
	16

4th Semester	
Real Estate Law PAR 203	3
Computer Applications for the Law Office PAR 204	3
Estates, Trusts & Wills PAR 205	3
Humanities Elective	3
PAR/ADJ/INS/OFF Elective	3
	16

5/89

PARALEGAL STUDIES CERTIFICATE

The demand for paralegals in the legal field increases yearly. Today's successful paralegal requires skillful performance in a variety of areas: legal research, litigation, real estate law, etc. The Certificate Program provides a year's training in these skills plus liberal arts courses, which are transferable to a Paralegal Associate's Degree at a later time.

First Semester	Credits
English Composition I ENG 100	3
Introduction to Paralegal Studies PAR 100	3
Legal Communications & Concepts PAR 101	3
Word Processing I OFF 151	4
Social Science Elective	3
	16

Second Semester	
English Composition II ENG 112	3
Word Processing II OFF 152	4
Business Law II BUS 242	3
Litigation PAR 201	3
PAR/ADJ/INS/OFF Elective	3
	16

5/89

APPENDIX A

PARALEGAL STUDIES PROGRAM COURSE COMPETENCIES

INTRODUCTION TO PARALEGAL STUDIES (PAR 100)

This introductory course is designed to provide the student with an overview of the duties of a paralegal in the legal community, familiarization with basic legal concepts, and the fundamentals of legal research. Upon successful completion of the course, the student should be able to:

Demonstrate the history of our modern legal system and apply the workings of the current Federal and State systems.

Assess how the various bodies of law have evolved through caselaw and statutes.

Identify the State and Federal Reporter systems and conduct basic legal research.

Identify legal terminology which will be used throughout the course of the paralegal program.

Assess the role of the paralegal in the modern law office.

PARALEGAL STUDIES PROGRAM COURSE CONTENT

PAR 100 INTRODUCTION TO PARALEGAL STUDIES

Unit 1. History of the Modern United States Legal System:

Week

1. The roots of the modern legal system and the concept of stare decisis.
2. The modern court system - Federal.
3. The modern court system - State.
4. Review of Unit 1.
5. Examination - Unit 1.

Unit 2. Caselaw Versus Statutory Law:

Week

6. The concepts of statutory and common law as applied in the Federal Court system.
7. The concepts of statutory and common law as applied in the State Court system.
8. Review of Unit 2.
9. Examination - Unit 2.

Unit 3. Legal Terminology:

Week

10. Introduction to legal terminology.

Unit 4. The Federal and State Reporter Systems:

Week

11. Introduction to the Federal and State reporter system (may include a trip to the Delaware County law library, including a tour of the Courthouse).
12. Basics of legal research.

PAR 100 INTRODUCTION TO PARALEGAL STUDIES (Continued)

Unit 5. The Role of the Paralegal in the Modern Law Office:

Week

13. Role of the paralegal in the modern law office.

14. Review of Units 3 through 5.

15. Final examination focusing on Units 3 through 5.

PARALEGAL STUDIES

READING LIST

INTRODUCTION TO PARALEGAL STUDIES (PAR 100)

Introduction to Paralegalism: Perspectives, Problems, and Skills, Third Edition, William P. Statsky

NALA Manual for Legal Assistants, 1979 Hardcover
Essentials of Paralegalism, 1988 Paperback, William P. Statsky

Essentials of Paralegalism, William P. Statsky

APPENDIX B

LEGAL COMMUNICATIONS AND CONCEPTS (PAR 101)

This course will provide a sound foundation upon which students may pursue a thorough and systematic course of paralegal studies.

The course will emphasize six general areas that a paralegal should understand: 1. General Business Principles; 2. General Finance Principles; 3. Insurance; 4. Law Office Management; 5. Preparation for Litigation; 6. Litigation. Terms and terminology will be specifically stressed, thereby enabling the student to master much of the "language" that effects upon or flows from the legal profession. Upon successful completion of course requirements, the student should be able to:

Demonstrate an understanding of the concepts and terminology inherent in business transactions.

Assess the wide variety of insurance products utilized within the industry.

Identify the day-to-day operations of a legal practice.

Organize the litigation process.

PAR 101 LEGAL COMMUNICATION AND CONCEPTS

Session	1.	Introduction to the course with a preview of the areas to be discussed.
Session	2.	Complete review of the systems of adjudication including federal and state court systems, administrative proceedings, and private court systems.
Session	3.	Preparation for trial/hearing/conference or settlement.
Session	4.	Preparation for trial/hearing/conference or settlement.
Session	5.	Filing court documents, rules of service, etc.
Session	6.	Rules and procedures during trial, administrative hearings, and conferences.
Session	7.	General business principals and terminology.
Session	8.	General finance principals and terminology.
Session	9.	Fundamental concepts and terminology in insurance.
Session	10.	Topic left open; time period to be utilized either to complete instruction begun in prior/forthcoming weeks and/or for additional discussion on prior weeks' topics.
Session	11.	Law office management and operations.
Session	12.	Review the basic legal principals; (torts vs. crimes, contracts, real property, etc).
Session	13.	Principals of trusts, estates and probates.
Session	14.	Professional responsibility.
Session	15.	Course review, questions and answers prior to final exam/paper.

LEGAL COMMUNICATIONS & CONCEPTS (PAR 101)

Case Analysis and Fundamentals of Legal Writing, Second Edition, William P. Statsky and R. John Wernet, Jr.

Legislative Analysis and Drafting, Second Edition, William P. Statsky

Legal Research and Writing: Some Starting Points, Third Edition, William P. Statsky

APPENDIX C

LEGAL RESEARCH AND ANALYSIS (PAR 120)

This course introduces prospective paralegals to methods of finding the law applicable to specific legal issues. This course will acquaint the student with the principles of research, types of law books and their scope, citation methods, interpreting case and statutory law and other legal authority, annotations, government publications and corresponding kinds of legal writing, organization and format. Students learn how to locate cases and to organize research findings. Upon successful completion of this course a student should be able to:

...Demonstrate various sources of legal authority: statutes, cases, and administrative codes and commentators. Students should be familiar with standard citation formats for each authoritative study.

...Apply the uniform West reporter system (both state and federal) to locate specific cases.

...Demonstrate the ability to cross-reference cases (by citation and by subject) using standard sources such as Shepherds, West Law Digests, A.L.R. and the like.

...Identify authoritative treastises and major commentators in such areas as contracts, torts, and real property law.

...Summarize research findings by preparing case notes and in-house memoranda to attorneys.

PAR 120 LEGAL RESEARCH AND ANALYSIS

Students will first be given an overview of the role of the judicial, legislative and executive branches of government contributing to our bodies of laws. The distinction between statutes, cases and administrative codes will be highlighted. The interpretive use of commentaries will also be discussed. At this stage, students will be introduced to the standard methods of citing the foregoing authorities.

Next, students learn to use the uniform West regional reporter systems and their state and federal counterparts in hands-on library experience. Each student will be assigned responsibilities for locating specific cases. After mastering the reporter systems, students will then learn to research specific legal issues by cross referencing cases in Shepherds Index, and by using subject-heading sources, such as, West Law Digests and the A.L.R. series.

At each of the foregoing levels, students will be expected to report their research findings in writing. They will summarize cases they have located using case notes, and they will begin to use the format of legal memoranda to report cases which have a bearing on specific legal issues to which they have been assigned.

APPENDIX D

FAMILY LAW (PAR 200)

This course surveys basic issues arising in a matrimonial case and introduces procedures by which marital issues are resolved. It covers skills and methods of securing essential documentation and litigating or settling divorce, alimony, property division, support and child custody claims. The course enables the student to prepare court documents, examines the anatomy of a comprehensive marriage settlement agreement. Upon successful completion of this course a student should be able to:

...Name the fundamental legal procedures for dissolving a marriage, determining support for children and dependent spouses, dividing property in a divorce, and arranging for the custody of children.

...Identify the kinds of information essential to resolving a matrimonial case and identify the most reliable and commonly used sources of such information.

...Demonstrate available discovery tools to obtain relevant information from adverse parties.

...Prepare commonly used court documents, such as, pleadings affidavits, income and expense statements, property inventories and the like in readable format.

...Identify the range of issues which should be addressed in the marriage settlement agreement and have working knowledge of specific contract clauses which settle such issues.

...Assess the role of and be able to work with experts in providing a marital case.

PAR 200 FAMILY LAW

Students are first introduced to the principles and procedures leading to divorce in the modern era of the "no-fault" divorce. Court procedures for deciding appropriate levels of child support, appropriate levels of (and liability for) alimony, equitable distribution of marital property, and child custody cases will be outlined.

For each of the foregoing issues, students will become familiar with the kinds of information which is necessary to resolve them. Students will study the importance of documentation, such as tax returns, bank statements, loan applications and records of closely-held businesses. Where such information is available only from the adverse party, the student will be instructed on the use of discovery tools permissible in matrimonial cases to obtain the needed documentation.

This course will also introduce the student to documents most frequently filed with the court: pleadings, affidavits of consent, affidavits of separation, income and expense statements, inventories and appraisements of real and personal property. Students will learn to prepare these documents in accordance with formats approved by the courts.

In the context of divorce litigation, students will study the role of the expert in proving a marital case: assessment of values of real property, pensions and other personalty;

testimony and using an expert as a consultant in preparing for trial.

In addition to preparing the student for divorce litigation, the course will also focus on the alternative to litigation: agreement. The fundamentals of a marriage settlement, and the issues which should be addressed by such an agreement, are described in detail.

FAMILY LAW (PAR 200)

Family Law, Second Edition, William P. Statsky

APPENDIX E

LITIGATION (PAR 201)

This course introduces students to litigation as the process for resolving disputes through the use of the court system. Provides an overview of the litigation process and a basic understanding of court procedures necessary to prepare students for assisting lawyers in a lawsuit. Areas of civil actions, including breach of contract and related lawsuits are covered. Upon successful completion of this course a student should be able to:

...Name the basic steps in the conduct of a civil lawsuit from pleadings through appeal.

...Identify the use of basic discovery tools, such as depositions, interrogatories, requests for admission, and requests for production in obtaining information and serving as a basis for approving a case in court.

...Plan and prepare digests of deposition transcripts and other forms of recorded testimony.

...Conduct pleadings in proper form and draft written discovery requests designed to elicit specific relevant information from adverse parties.

...Detail the uses of pre-trial motions to decide cases and to simplify issues for trial.

...Introduce the necessary procedures and tools available for the enforcement of civil judgments.

PAR 201 LITIGATION

This course will first examine the course of a typical civil lawsuit. The role of pleadings, discovery, pre-trial motions, pre-trial communications between court and litigants, trial and appeal are outlined.

Students will learn to prepare pleadings in proper form. They will study the use of basic discovery tools (depositions, interrogatories, requests for admission, and requests for production) in detail. They will study methods of drafting interrogatories in such a way as to require the responding party to answer with specific information. They will study the importance of drafting concise answers to interrogatories propounded by adverse parties.

Included in the course would be practical instruction on the art of reviewing, summarizing, and digesting (with page references) written transcripts of depositions already conducted by the attorneys. Students should learn to select and condense the most important evidence contained in the deposition transcripts.

The course will then focus on the use of pre-trial motions to further prepare a case for trial: motions to compel discovery, motions for summary judgment, and motions anticipating the use of (and objections to) certain trial evidence will be studied.

With respect to the trial segment of this course, guest lectures by practicing attorneys should be used to expose students to different views on how a paralegal can effectively serve in a support capacity to an attorney while counsel is actually trying a case.

Students will study the uses and the limits of post-trial motions and appeal as a way of affecting the outcome of a lawsuit. The bases of appeal and procedures for perfecting appeal will be addressed.

Finally, students will be exposed to the resources available for forcing civil judgments by means of levy, attachment, garnishment, etc. Particular attention will be devoted to the preparation of court documents, such as, Writs of Execution, levy forms, and interrogatories in aid of execution.

APPENDIX F

CORPORATIONS AND PARTNERSHIPS (PAR 202)

This course provides an overview of the structure, regulation, and financing of a business corporation. The rule of shareholders, directors, and officers are examined, as well as the various options for management of the corporation and its agents and employees. Equity and debt securities are reviewed in light of their function in financing corporate endeavors and their tax implications.

A basic review of the securities acts and also of mergers and acquisitions is included. This course allows for substantial use of case studies and state forms and sample agreements to provide illustrations.

Upon successful completion of this course, a student should be able to:

...Recite the different types of business structures, e.g. sole proprietorship, general partnership, limited parnership, coporation (including Subchapter 5), and know the reasoning behind doing business according to one or another structure, the difference in method of ownership, liability and taxation, and state regulation.

.. Describe how to form a corporation, including how to assemble information, complete and file forms, issue stock and organize the corporate kit, arrange meetings of the shareholders and Board of Directors, elect officers, and be able to qualify the corporation in another state, and dissolve a corporation.

...Describe the difference between equity and debt securities, how corporations are financed, how corporate dividends are issued, and name the various rights and agreements of security holders.

...Outline the principle/agent relationship and the basic terms of employment agreements, including duties, compensation, and restrictive covenants.

...Identify special forms of corporations and name their purpose and structure.

APPENDIX G

PAR 203 REAL ESTATE LAW

Unit 1. Residential Real Estate

Week

1. What is real property?
2. Initiating a residential real estate transaction - the Agreement of Sale.
3. Financing the transaction - the Mortgage and Note.
4. Title insurance and title reports.
5. Drafting the Deed and Easement Agreements.
6. Preparing for a residential real estate settlement.
7. Review of Unit 1.
8. Examination - Unit 1.

Unit 2. Commercial Real Estate Transactions

Week

9. Contrasting the commercial and residential transaction.
10. Drafting the commercial Agreement of Sale.
11. Environmental issues.
12. Financing documents relating to the commercial transaction.
13. Preparing for a commercial real estate settlement.
14. Review of Unit 2.
15. Final examination focusing on Unit 2.

REAL ESTATE LAW (PAR 203)

The purpose of the Real Estate course is to provide the student with skills necessary to assist the attorney with a variety of residential and commercial real estate transactions. The student will learn to draft various real estate related documents including Agreements of Sale, Easement Agreements, Financing Documents and Deeds. Upon successful completion of this course a student should be able to:

...Organize and draft legal documents relating to residential transactions.

...Demonstrate and prepare for a residential real estate settlement.

...Assess basics of title insurance and financing documents which relate thereto.

...Draft various documents relating to the sale of commercial property.

...Prepare for a commercial real estate settlement.

APPENDIX H

COMPUTER APPLICATIONS FOR THE LAW OFFICE (PAR 204)

This course provides the student with a general knowledge of how computers can be used in the law office. Legal applications covered will include: litigation, estate administration, docket control, and research programs. Software programs for the business operations of the law firm, such as, word processing, calendar, and billing, will also be introduced. Upon successful completion of the course the student should be able to:

Demonstrate a general awareness of how computers can be used to organize and manage the daily caseload of a typical small law firm.

Apply knowledge of the variety of available software programs and how they operate through demonstrations by guest speakers.

Demonstrate a working knowledge of each program and learn to perform all of its basic functions through hands-on experience with exemplary programs.

PAR 204 COMPUTER APPLICATIONS FOR THE LAW OFFICE

Students will first be given an overview of the power of computer programs to help law firms organize and manage cases and conduct various activities.

Guest speakers (representatives of various software manufacturers) will be invited to demonstrate how their specific programs vary from the exemplary software used for demonstration in the course.

Competencies that address each phase of the exemplary software will be achieved on an individualized basis utilizing open lab time in the academic computing facility.

APPENDIX I

ESTATES, TRUSTS AND WILLS (PAR 205)

This course is designed to show the prospective paralegal how to prepare documents related to the administration of trusts and estates and distribution of their assets. Students will learn to identify basic issues related to estate planning. Students will also acquire an understanding of the formal requisites of will drafting and execution. Procedures for probate and administration of estates are covered as are related tax issues, such as, state inheritance, federal estate and fiduciary income taxes. Upon successful completion of the course the student should be able to:

Assess the kinds of information needed to administer an estate and become conversant with the use of checklists to obtain such information

Identify legal procedures central to securing Letters Testamentary and Letters of Administration through Probate.

Demonstrate other legal procedures pertinent to estates: obtaining federal tax I.D. numbers; notifying institutions of the authority of the personal representative; inventory of safe deposit boxes; appraisals of real and personal property; and the like.

Prepare court documents most commonly filed in connection with estate administration: inventories, Orphans Court Accountings, caveats, and audit documents.

Prepare tax returns, such as, Pennsylvania Inheritance Tax Returns, Federal Estate Tax Returns, the decedent's Final Lifetime Income Tax Return, Federal Fiduciary Income Tax Return, and Personal Property Tax Return.

Assist an attorney in preparing wills and inter vivos trusts, disposing of client's assets at client's direction.

Determine the specific formal requirements for executing wills and trusts to insure avoidance of post-mortem challenges.

PAR 205 ESTATES, TRUSTS AND WILLS

This course will first survey, in cursory fashion, the administration of a typical estate. Students are introduced to the meaning of (and necessity for) probate; the marshalling of assets; tax returns routinely filed; required notification of heirs and creditors; the role of the personal representative; the role of the Orphan's Court; and the use of family settlement in estate administration.

Next, the students will be instructed on the varieties of factual information which must be obtained for the attorney responsible for the estate. Forms, form letters and checklists will be used liberally as a teaching tool.

The legal procedures associated with probating wills and obtaining Letters of Administration are examined in some detail. Covered issues include the significance of advertising, the role of witnesses, and the use of "short certificates."

Other legal procedures for administering estates will also be discussed. Establishing estate accounts, obtaining a federal tax I.D. number, entering safe deposit boxes before and after the grant of Letters, receipt of insurance proceeds, stock and motor vehicle transfers, transfers of other personal property, appraisals of personal property and real estate, payment of the family exemption and advancements to heirs are all studied.

This course will stress the accurate reporting of estate administration and preparation of court documents such as the

Pennsylvania Inheritance Tax Return, Federal Estate Tax Return, decedent's Final Lifetime Return, and Federal Fiduciary Income Tax Return.

Finally, students will be exposed to the basic principles of will-drafting. Particular emphasis will be given to the details of executing wills and the formal requirements for signing and witnessing a valid will.

APPENDIX J

Delaware County Community College Media, Pennsylvania 19063

February 3, 1989

Dear Sir/Madam:

Delaware County Community College is in the process of organizing a two-year program for Paralegal Studies. The college currently offers a two-year degree in Office Administration with a specialty in legal secretarial, but with the growing demand for qualified paralegals, we plan to broaden the scope of the program.

Would you please take a minute to complete the enclosed questionnaire and return it to me:

Ms. Trudy Riddell
c/o Office Administration
Office A-305
Delaware County Community College
Rt. 252 and Media Line Rds.
Media, PA 19063

Additionally, if you have any questions or comments, please feel free to call me at (215) 586-5005. Thank you in advance for your cooperation.

Sincerely,

Trudy Riddell

Trudy Riddell

Enc.

QUESTIONNAIRE - PARALEGAL PROGRAM

1) Type of employer:

a) private law firm
   1) suburban law firm 2) city law firm
b) corporation/business
c) government
d) real estate
e) other _____

2) How many paralegals do you employ?

a) 1
b) 2-5
c) 5-10
d) 10-20
e) More than 20

3) In what areas of practice do you find paralegals to be most useful?

a) Civil Litigation b) Real Estate
c) Trust & Estates d) Family Law
e) Corporate Law f) Securities Law
g) Criminal Law
h) Other _____

4) Please list a few courses that you deem appropriate for a paralegal? (For instance, legal writing, real estate, legal research, etc.)

_____

_____

_____

5) In your opinion, what skills are most important for paralegals?

_____

_____

_____

6) Recommended starting salary for paralegals? _____

7) Recommended average salary for paralegals? _____

8) Recommended highest salary for paralegals? _____

9) Which software training do you prefer your paralegals to have? Westlaw _____ Lexis _____